March 2006

RE: EDExpress for Windows 2006-2007, Release 2.0

Dear EDExpress Users:

We are pleased to announce the availability of EDExpress for Windows 2006-2007, Release 2.0. Release 2.0 adds Pell and Direct Loan functionality for the 2006-2007 award cycle.

This letter includes the following information:

- A list of enhancements to Global functions that affect Pell and Direct Loan processing;

- A list of enhancements to the EDExpress Pell and Direct Loan modules for 2006-2007;

- Results gathered from benchmark testing to help you determine how EDExpress performs in certain operating environments;

- Reminders on backing up and optimizing your EDExpress database

All schools participating in the Federal Pell Grant Program or the Federal Direct Loan Program must use the Common Origination and Disbursement (COD) System to process Pell and Direct Loan data. EDExpress for Windows 2006-2007, Release 2.0 can be used by schools to exchange Pell and Direct Loan data with the COD System for the 2006-2007 cycle.

Schools send and receive Pell and Direct Loan origination and disbursement data to and from the COD System using the Common Record's Extensible Markup Language (XML) format. EDExpress converts your data to XML format automatically during the export process, and can import files returned from the COD System in XML format.

How to Get EDExpress and Documentation

You can download Release 2.0 and related user documentation from the U.S. Department of Education's Federal Student Aid Download (FSAdownload) Web site, located at fsadownload.ed.gov.

Instructions for downloading EDExpress are located in the "Downloading Documentation and Software from the FSAdownload Web Site" section of the *2006-2007 Installation Guide for EDExpress for Windows* at fsadownload.ed.gov/softexpress0607.htm.

If you have trouble opening the FSAdownload Web site, contact CPS/SAIG Technical Support at **800/330-5947; TDD/TTY 800/511-5806** or by e-mail at CPSSAIG@ed.gov.

Note: Some organizations restrict their users from downloading programs from Internet sites. If you have trouble downloading, contact your technical support staff to ensure that you have full download rights.

Important Installation Alert

If you use Windows 2000 or Windows XP, you must be an Administrator on your workstation to install EDExpress. If you are not an Administrator, you will receive a warning when you try to install EDExpress. After an Administrator has installed EDExpress, you can run EDExpress for Windows 2006-2007 as a member of the Power Users group. If your database is on a network server, you must be a Power User or higher on the network (or domain) as well as on your workstation. There are no workarounds for these Windows rights issues. Consult with your school's technical department if you receive a warning that an Administrator must install the EDExpress software.

If You Have Technical Support Questions

If you have questions regarding EDExpress, such as installation issues, software problem resolution, or software functionality, or if you need technical assistance, contact CPS/SAIG Technical Support.

You can reach CPS/SAIG Technical Support Monday through Friday, 7 a.m. – 7 p.m. (CT), at **800/330-5947 (TDD/TTY 800/511-5806**). You can also send e-mail inquiries, comments, or suggestions to CPSSAIG@ed.gov. A representative will respond within 24 business hours.

You can also post questions regarding EDExpress on our e-mail listserv, FSATECH. FSATECH is an e-mail listserv for technical questions about the U.S. Department of Education's Federal Student Aid systems, software, and mainframe products.

For more information about FSATECH, including how to subscribe, visit the Federal Student Aid Schools Portal: Listservs & Mailing Lists: FSATECH Web site at:

ed.gov/offices/FSA/services/fsatechsubscribe.html

Note: Make sure you include your telephone number in your message in case we need additional information. We will research your question and post our response to the listserv so that everyone can benefit from the information.

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EDExpress for Windows 2006-2007, Release 2.0

EDExpress for Windows 2006-2007, Release 2.0 adds two software modules:

- Pell

- Direct Loan

In addition, Global functionality applicable to all modules, such as Security setup, Document Tracking setup, and User Database setup and entry is added during any installation of EDExpress.

EDExpress for Windows 2006-2007, Release 1.0, posted in January 2006, contained the Application Processing and Packaging modules. If you have not yet installed Release 1.0, you can install these two modules using Release 2.0.

Release 2.0 is an upgrade to Release 1.0, and will not overwrite your Release 1.0 database unless you choose the Network Server or Standalone Full installation options.

For more information on the EDExpress installation process, see the *2006-2007 Installation Guide for EDExpress for Windows*, which is available for download from the FSAdownload Web site at fsadownload.ed.gov/softexpress0607.htm.

Product Updates for Section 508 Compliancy

EDExpress 2006-2007 contains updates to software grids, field labels, and help text to ensure compatibility with screen reader technology used by the visually impaired, in compliance with Section 508 of the Rehabilitation Act.

Screen reader software cannot interpret color shading in EDExpress software entry fields or directly read the contents of software grid cells. To accommodate these restrictions, EDExpress users will notice the following major changes:

- All software fields that are shaded yellow to indicate they are required now also display a "-R" after the software label. The "-R" indicates the field is required.

- All software fields that are shaded blue after a previously saved value has been modified now also display a "-C" after the software label. The "-C" text indicates the field has been changed. If the change is made to a field that is shaded yellow, the "-C" text will replace the "-R" text after the label.

- All software grids now display floating text descriptions of the contents of grid cells when cells are selected. The text appears one cell above (or one cell below, for cells in the first line of the grid) the selected cell. The text lists Row number, Column title, and (if applicable) the current Value. Clicking once in a cell, or using the Tab key or arrow keys to move to a cell, displays the text. Clicking a second time hides the text.

The first time you log into EDExpress, the default user ID and password is SYSADMIN. The system then prompts you to change the default password by entering a new password and verifying it. Floating text is always enabled for the SYSADMIN user ID and always appears on the Startup Information dialog box. For all users other than SYSADMIN, floating text is disabled by default. To enable it, select the **Enable 508 Grid Functionality?** checkbox on the Security Users dialog box. To disable the floating text, go to **Tools**, **Setup**, **Global**, **Security Users** and create a new user ID and password. Exit the software, and then log back in with your new user ID and password.

Note: Users will always see the "-R" and "-C" text added to software fields.

General Enhancements

Listed below are general product enhancements applicable in EDExpress 2006-2007, Release 2.0. Some enhancements were originally made available to users in Release 1.0, and are repeated here for the benefit of users installing EDExpress 2006-2007 for the first time.

For more information on enhancements to Application Processing, Packaging, and Global functionality, see the *EDExpress for Windows 2006-2007, Release 1.0 Cover Letter*, which is available for download from the FSAdownload Web site at fsadownload.ed.gov/softexpress0607.htm.

Global Security

- **508 Grid Functionality Checkbox Added.** We added a checkbox, Enable 508 Grid Functionality?, to Security Users setup. This checkbox enables administrators to activate floating text descriptions of cell contents in software grids for staff who are using screen reader technology. Selecting this checkbox activates the floating text for a specific user ID, while clearing the checkbox deactivates the floating text for a specific user ID for all grids except the Startup Information dialog box. Floating text is always enabled for the SYSADMIN user ID and always appears in the Startup Information dialog box. For all users other than SYSADMIN, floating text is disabled by default.

Global Setup

- **File Formats Restricted to 255 Fields.** We modified File Format setup for all EDExpress modules to enable users to add a maximum of 255 fields to each unique File Format. In prior versions of EDExpress, using a File Format with more than 255 fields resulted in software errors during the External Export process.

Global Entry

- **Labels Modified for Yellow-Shaded Required Fields.** As part of the overall update of EDESuite software for Section 508 compliancy, all software fields that are shaded yellow to indicate they are required for the given tab, dialog box, or process now display "-R" after the label. Certain required fields, particularly those required in some circumstances but not others, are not displayed with yellow shading, and hence will not display the "-R" as part of the field label, even though the fields must be entered before a given process or function can be run.

- **Labels Modified for Blue-Shaded Modified Fields.** As part of the overall update of EDESuite software for Section 508 compliancy, all software fields that change to blue shading after a change is saved to a previous value in the field now display "-C" after the field label. The "-C" text only appears as part of the label after the change is saved. If the change is made to a field that is shaded yellow, the "-C" text replaces "-R" after the label.

- **"Floating" Text Added to Software Grids:** As part of the overall update of EDESuite software for Section 508 compliancy, software grids now display "floating" text descriptions of the contents of grid cells when cells are selected. The text appears one cell above (or one cell below, for cells in the first line of the grid) the selected cell. The text lists Row number, Column title, and (if applicable) the current Value. Clicking once in a cell, or using the Tab key or arrow keys to move to a cell, displays the text. Clicking a second time hides the text. Floating text is always enabled for the SYSADMIN user ID and always appears on the Startup Information dialog box. For all users other than SYSADMIN, floating text is disabled by default. To enable it, select the Enable 508 Grid Functionality? checkbox on the Security Users dialog box. To disable the floating text, you may go to Tools, Setup, Security Users and create a new user ID and password. Exit the software, and then log back in with your new user ID and password.

Global Reports

- **Student Summary Report Displays Cents for Pell Awards.** We updated the Pell Grants section of the Student Summary report to print Pell award amounts in both dollars and cents. Previously, this report only displayed whole dollar values for Pell awards.

Prior Year Import

- **Prior Year Global Setup Fields Added**: Prior Year User-Defined Queries, Setup, and File Formats Import now imports values for the following Global setup fields (listed by Global setup area) from the prior year's EDExpress database:

  – FAA Access setup: All fields

  – System setup: Default E-mail Address and Default Address

  – Security Users setup: Automatically Transmit?

- **Prior Year Global File Format Import.** Prior Year User-Defined Queries, Setup, and File Formats Import now imports Global File Formats and associated fields from the prior year's EDExpress database.

- **Prior Year File Format Field Count Limitation Added.** Prior Year User-Defined Queries, Setup, and File Formats Import no longer allow the import of a File Format from the prior year's EDExpress database if more than 255 EDExpress fields are selected in the File Format. In prior versions of EDExpress, using a File Format with more than 255 fields resulted in software errors during the External Export process.

- **Prior Year Demographic Data Import.** Prior Year Demographic Data Import now imports values for the Demo tab fields E-mail Address 2 and Country Code from the prior year's EDExpress database. These were new fields in EDExpress for Windows 2005-2006.

Pell and Direct Loan Import

- **Import and Export Files Automatically Backed Up.** EDExpress automatically backs up your files rather than prompting you to back them up when 1000 files of the same message class already exist in the import or export directory. If EDExpress determines that 1000 files of the same message class already exist, the software creates a backup subdirectory called "BACKUP" in your existing data directory and automatically moves the files to the subdirectory. This prevents previously imported or exported files from being overwritten when you import or export new files.

- **Disbursement Data Reformatted on Response Import Edit Report.** We revised the format of the Disbursement Response section of the COD Response (message class CRAA07OP) import edit report to identify the data elements associated with each column heading more clearly.

Pell and Direct Loan Data Processing

- **Updated Valid Date Ranges.** We updated valid date ranges for Pell and Direct Loan processing for the 2006-2007 processing cycle to synchronize EDExpress with COD System edits and federal policy. These date ranges include:

Field	Range
Pell Enrollment Date	01/01/2006 to 06/30/2007
Pell Payment Period Start Date	01/01/2006 to 06/30/2007
Pell Disbursement Date	07/01/2006 to 09/30/2012
Date of Birth (DL only)	01/01/1907 to 12/31/1998
DL Award Begin Date	07/02/2005 to 06/30/2007

Field	Range
DL Award End Date	07/01/2006 to 06/29/2008
DL Academic Year Start Date	07/02/2005 to 06/30/2007
DL Academic Year End Date	07/01/2006 to 06/29/2008
DL Disbursement Date	06/22/2005 to 10/27/2008

Pell-Specific Enhancements

The following enhancements solely affect the Pell module:

- **Processed Date Field Renamed.** We updated all references to the "Origination Processed Date" field in the Pell module to read "Last Pell Processor Date."

- **Pell Award Amount Displayed in Dollars and Cents.** We updated EDExpress to display Pell award amounts in both dollars and cents throughout the Pell module, including:

  - Fields on the Pell Origination and Disbursement tabs

  - Fields printed on Pell reports

  - Values displayed in Pell Multiple Entry

Direct Loan-Specific Enhancements

The following enhancements solely affect the Direct Loan module:

Entry

- **Master Promissory Note (MPN) Fields Renamed.** We updated all references of "Note" to "MPN" in the following fields:

  - "Signed Note Received" renamed to "Signed MPN Received"

  - "Date Signed Note Received" renamed to "Date Signed MPN Received"

Import

- **Import Statistics Dialog Box Modified.** The total number of processed records displayed in the Direct Loan Import Statistics dialog box is now calculated as the sum of accepted, rejected, and skipped records.

- **Packaging Data Import Error Description Revised.** When a user attempts to create a subsidized or unsubsidized loan record from a Packaging record with a Transaction # equal to "00" (on the Awards tab), EDExpress now displays a more detailed error message explaining the error on the import edit report for the Loan Data – Packaging import.

Reports

- **DL Reports Group Records by Original Social Security Number (SSN).** Origination and disbursement data for student records is now grouped by Original SSN on all Direct Loan reports instead of Current SSN. This change makes it easier to identify borrowers in your database with the same Current SSN but different names, Original SSNs, and Loan IDs.

- **Disclosure Statement Loan Information Sort Order Added.** For consistency, the Loan Information section of the Disclosure Statement report always prints subsidized loan information before unsubsidized loan information when data for both loan types is present.

Query

- **Pre-Defined Query Parameters Modified.** We updated the criteria for the "LAA Not Equal Endorser Amount" pre-defined query to filter for records with a Credit Decision value equal to E (Endorser OK), in addition to the current query criteria. This change provides more accurate results for users attaching this query to reports or other EDExpress functions.

COD Technical Reference

The *2006-2007 COD Technical Reference* provides technical specifications and record layouts for transmitting Pell Grant and Direct Loan data to the COD System. You can download this technical reference from the FSAdownload Web site, located at fsadownload.ed.gov.

EDExpress Benchmarking

We performed benchmarking tests on the EDExpress for Windows 2006-2007, Release 2.0 software to determine how it operates in certain operating environments.

Imports

The benchmarking results for EDExpress import files are as follows:

- These tests were all completed on a Pentium 1.2 GB MHz with 512 MB RAM.

- These imports were imported into an empty EDExpress database in Windows 98, Windows Me, Windows 2000, and Windows XP.

- The Benchmarking Volume is the number of records.

- The Time Elapsed column indicates the measurement of time starting when the user clicks OK in the Import dialog box and the import process begins through the time the import statistics are displayed.

Direct Loan

Import	Operating System	Benchmarking Volume	Time Elapsed
External Add	Windows 98	1000 records	3 min, 27 seconds
External Add	Windows Me	1000 records	3 min, 37 seconds
External Add	Windows 2000	1000 records	2 min, 28 seconds
External Add	Windows XP	1000 records	2 min, 20 seconds
ISIR Import	Windows 98	1000 records	1 min, 20 seconds
ISIR Import	Windows Me	1000 records	1 min, 19 seconds
ISIR Import	Windows 2000	1000 records	1 min, 6 seconds
ISIR Import	Windows XP	1000 records	1 min, 15 seconds

Pell

Import	Operating System	Benchmarking Volume	Time Elapsed
Pell YTD Data	Windows 98	2032 records	21 seconds
Pell YTD Data	Windows Me	2032 records	7 seconds
Pell YTD Data	Windows 2000	2032 records	9 seconds
Pell YTD Data	Windows XP	2032 records	5 seconds
Origination Data – ISIRs	Windows 98	1000 records	9 seconds
Origination Data – ISIRs	Windows Me	1000 records	9 seconds
Origination Data – ISIRs	Windows 2000	1000 records	8 seconds
Origination Data – ISIRs	Windows XP	1000 records	4 seconds

Reports

The benchmarking results for EDExpress reports and lists are as follows:

- These reports were tested in Windows 98, Windows Me, Windows 2000, and Windows XP on an HP LaserJet 4Si printer.

- These tests were all completed on a Pentium 1.2 GB MHz with 512 MB RAM.

- The Benchmarking Volume is the number of records and approximate number of pages that were printed in the test.

- The Time Elapsed column indicates the measurement of time starting when the user clicks OK in the EDExpress Print dialog box and ending when the operating system (Windows 98/Me/2000/XP) Print dialog box appears.

Direct Loan

Report	Operating System	Benchmarking Volume	Time Elapsed
List–Anticipated Disbursements	Windows 98	5 records, 10 pages	1 second
List–Anticipated Disbursements	Windows Me	5 records, 10 pages	1 second
List–Anticipated Disbursements	Windows 2000	5 records, 10 pages	1 second
List–Anticipated Disbursements	Windows XP	5 records, 10 pages	1 second
Sub/Unsub/PLUS MPNs	Windows 98	2 notes, 4 pages	1 second
Sub/Unsub/PLUS MPNs	Windows Me	2 notes, 4 pages	1 second
Sub/Unsub/PLUS MPNs	Windows 2000	2 notes, 4 pages	1 second
Sub/Unsub/PLUS MPNs	Windows XP	2 notes, 4 pages	1 second

Pell

Report	Operating System	Benchmarking Volume	Time Elapsed
Pell Origination Record	Windows 98	3 records, 6 pages	1 second
Pell Origination Record	Windows Me	3 records, 6 pages	1 second
Pell Origination Record	Windows 2000	3 records, 6 pages	1 second
Pell Origination Record	Windows XP	3 records, 6 pages	1 second
Pell Disbursement List	Windows 98	40 records, 6 pages	1 second
Pell Disbursement List	Windows Me	40 records, 6 pages	1 second
Pell Disbursement List	Windows 2000	40 records, 6 pages	1 second
Pell Disbursement List	Windows XP	40 records, 6 pages	1 second

Reminders

Back Up Your Database Regularly

You should back up your EDExpress database file (expres67.mdb) regularly so you do not lose your data. We recommend that you back up your files after each major update to your database (for example, updating a large group of origination or disbursement records), or at least once a week. You should also back up your data before and after you run the software utilities as a precautionary measure.

EDExpress does not include a backup utility. You must use your own backup system. Be sure to test your backup system regularly to verify that you can reliably restore your database.

Optimize Your Database with Software Utilities

EDExpress contains utilities that enable you to optimize your database to prevent problems. We recommend that you run the Compact and Repair Database and Verify Database utilities at least once a week. Be sure to create a backup of your database before and after running these utilities.

Run the software utilities in the following order:

- Compact and Repair Database

- Verify Database

- Compact and Repair Database

Run the Compact and Repair Database Utility

The Compact and Repair Database utility resolves inconsistencies in record storage and improves the performance of EDExpress by optimizing the database (expres67.mdb) file and reclaiming space on your computer's hard drive. Running this utility at least once per week helps to prevent database problems.

Events such as a power outage or a Local Area Network (LAN) failure can corrupt your database if it occurs while EDExpress is updating student records. If your system functions unpredictably (for example, you start getting database error messages, even for something as simple as a missing flag on a record), run the Compact and Repair Database utility.

Running the Compact and Repair Database function on a regular basis can make your database significantly smaller and improve EDExpress' performance. The utility reduces the size of your database by organizing and storing records more efficiently and by removing any records that have been flagged for deletion.

Warning: Before using the Compact and Repair Database utility, be sure you have space on your hard drive that is at least equal to three times the current size of the database.

Run the Verify Database Utility

Each student record in EDExpress has multiple parts that are stored in different database tables. The Verify Database utility checks the integrity of relationships between these tables. If EDExpress shuts down due to a program error or halts abnormally while you are processing data, links between various parts of a record may become damaged. Verify Database repairs these damaged links within the database.

You should always run the Compact and Repair Database utility before and after running the Verify Database utility. Running this utility at least once per week is recommended as part of your preventative maintenance routine.

Warning: Before using the Verify Database utility, verify you have hard drive space available that is equal to at least three times the current size of your EDExpress database.